

EXERCISE 7

BALANCED ACTION PLAN - BOTH CONTENT AND PROCESS

This exercise is intended for the management team in charge of a change initiative. It is not the type of plan that you normally think of when you prepare your actions for the coming three months. In most cases we have a good understanding and experience of planning the more rational and tangible aspects of a change initiative, what we call the "content" issues or "above the surface" in the iceberg metaphor. The aim of this plan is to connect the daily operational events and the rational change activities (content) with the process-related issues (e.g. "below the surface"). The "process" issues are the intangible issues, such as how we should deal with human reactions, politics, resistance, fear, etc. It is our experience that this plan cannot be stretched more than 2-3 months and that it needs to be reviewed and updated constantly (weekly), especially during times of turbulent change.

Purpose and objective

- To identify, visualise and align the content with the process aspect of a change initiative into our overall plan. To serve as a base for a more detailed action plan which the management team can conduct follow-ups against.
- At the end of the exercise everyone in the management team should be able to communicate the overall picture of the implication of the change initiative linked to the daily operational activities.

Steps to take

1. Prior to your meeting ask everyone to read at least Chapters 3-6 and 8.
2. At the meeting, start by introducing the purpose and objective of this exercise.
3. Draw a horizontal time line along the middle of the entire white board. Write out the next three months in terms of weeks.
4. Hand out post-it notes and ask everyone to individually brainstorm about what they think and feel we need to consider in our Balanced Action Plan. NOTE: this should include both content and process issues.
5. Gather everyone at the whiteboard and ask them to read aloud each post-it note (one at a time) and place it on the whiteboard. Content issues above the timeline and process issues below. It is acceptable to ask for clarification, but not to question.
6. When all ideas are on the board, arrange them in chronological order against the timeline. Now is the time to question, add or remove.
7. Identify where in time you have critical moments. For instance, when many activities are scheduled for the same time, or events that may trigger human reactions which you need to address.
8. Put your plan into an action list.

Time needed

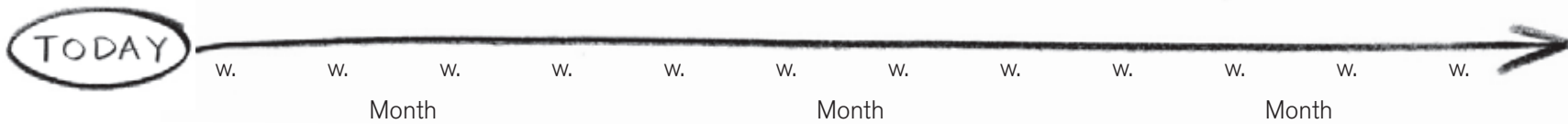
You will need 2-4 hours, including the introduction, exercise and reflection. The time depends on the scope and type of change and the number of people in the group doing the exercise.

EXERCISE 7

IMPORTANT ASPECTS IN OUR CHANGE PROCESS OVER THE NEXT THREE MONTHS

Tasks - Activities

Write what each team member sees as critical activities that will have an impact on the anticipated change and relate this to the timetable.



Personal/Process

Write what each team member sees as critical impacts the change will have on individuals with relations to the organisation and relate this to the timetable.